PACKAGING

THE CAHNERS MAGAZINE FOR DECISION-MAKERS FEBRUARY 1990

BEST GLASS PACKAGES

Winners Of The 1990 Clear Choice Awards

How To Work With Outside Designers

What's Available In Shrink-Wrap Machinery

Multipacking Emerges As Key Marketing Tool

Ralston Debuts Cat Feeder Pack

Material Tax Balloon Bursts

Phew on this tax

It was just a matter of time, I suppose. Still, the Bush administration's short-lived trial balloon on a packaging materials tax caught everyone in the packaging community by surprise. The balloon was almost immediately shot down, reportedly on the basis that such a tax would violate the administration's "no new taxes" pledge. (For details on the proposal, see senior editor Greg Erickson's report in "Packaging News.")

But don't be lulled: We have it on good authority that the idea came from the highest levels of the White House. We'll be very surprised if this idea doesn't resurface and soon.

And make no mistake: If we end up with a materials tax, packagers would be among the first to foot the bill. If you hate the idea—on a basis of principle, fairness or rank self-interest—you'd better start screaming now.

We're already on record urging an effective (a big qualifier) federal solution to the solid-waste problem. A materials tax could fund such a solution while offering incentives for use of recycled materials. But we have serious problems with the proposal as it was described in *The Wall Street Journal* Jan. 3.

First, it appears to single out packaging. That's not fair. It significantly limits the tax's effectiveness as an incentive for American industries to use recycled materials, since packaging makes up only a third of municipal solid waste.

Second, a flat per-ton tax applied equally for all materials appears to create an uneven playing field. Some materials are denser than others. While this is a complex issue, any materials tax must be materials neutral.

Not least, somebody had better examine the inflationary impact of such a tax. We did a simple calculation: At $20 a ton, the tax would be a penny a pound. If a plastic resin sells for 50 cents a pound, that's 2 percent. Push that out through the economy and see what happens.

A materials tax would have to be a lot fairer and a lot more carefully thought out before we would even consider the idea.

Robin Ashton

EDITOR IN CHIEF

On the cover: E.D. Smith's preserve line; jars by Consumers Glass. Photo: Loring Nelson-Curry

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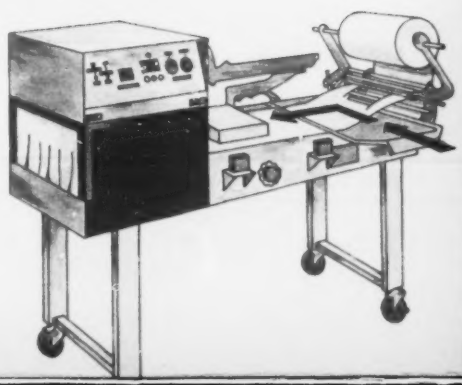

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Hype Can Be A Hazard

Pro-environment claims raise concern

Speaking to the recent annual retreat of the Council on Plastics and Packaging in the Environment, pollster Anthony M. Casale said, "in terms of pure marketing hype, the environment may be to the '90s what cholesterol was to the late '80s. . . ."

According to Casale, vice president and general manager of the Gordon Black public opinion research firm, growing consumer concern for the environment "has come to the attention of a lot of people with dollar signs in their eyes. A growing number of companies are already adding environmental promotion programs as part of their marketing campaigns."

Casale warned COPPE members that that might not always be wise. "What we have found is that people are very confused over the entire issue. . . . Most adults clearly don't understand . . . terms like 'recyclable' and 'degradable' and what they mean. And they have no clear-cut image to go along with the phrase 'environmentally friendly.'"

Here's one example of how confusing those terms can be: A paper developed by Goodyear's Polyester Div. contends that the question should not be "Is this product recyclable?" but "Will this product be recycled?"

The paper, presented recently to the Society of Plastics Engineering Regional Technical Conference, states that all products are potentially recyclable. It adds, however, that many recyclable products may never become recycled products.

The legal ramifications are worth considering: The attorneys general of seven states have been scrutinizing use of terms such as "recyclable" and "degradable" by companies that have seen marketing potential in the so-called green movement.

Already, some companies may be wishing they had never labeled their plastic products degradable. A half-dozen national environmental groups have begun campaigning for a consumer boycott of "degradable-plastic" products. At a press conference last December, the Environmantal Defense Fund, the Environmental Action Foundation and four similar groups called degradable plastics a "rip-off" and a "hoax." Together the groups intend to mail anti-degradables information kits to hundreds of thousands of consumers.

If there is a moral to this story, it's "Look before you leap."

Government's Role Seen Growing

Poll shows that packagers expect big changes

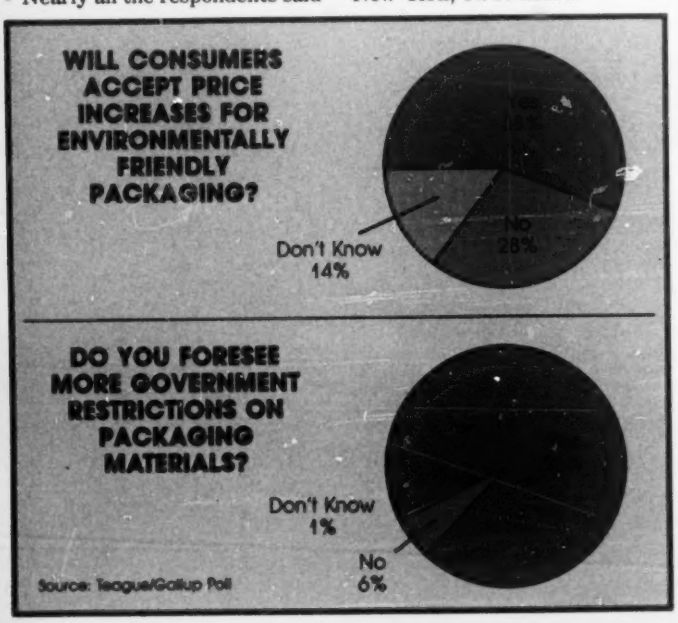
Public awareness of environmental problems is having a significant impact on packaging, according to a new Gallup Organization survey of packaging decision-makers.

Commissioned by Walter Dorwin Teague Associates, Inc., a New York City design firm, Gallup randomly surveyed 100 packaging professionals from leading consumer-product companies.

Here are some of the findings:

- Nearly all the respondents said they believed that government restrictions on packaging would increase from present levels.
- Two-thirds of the respondents said they felt growing consumer concern for the environment had affected their industry.
- More than half said they believed consumers would accept price increases in order to obtain products that they could think of as environmentally friendly.
- Nearly half said they had changed some of their packaging to make it more environmentally friendly.
- Of the respondents who said they had not changed their packaging, 28 percent reported planning to do so in the future.

For more information, contact Lobsenz-Stevens, Inc., Public Relations, 460 Park Ave. South, New York, N.Y. 10016.


WILL CONSUMERS ACCEPT PRICE INCREASES FOR ENVIRONMENTALLY FRIENDLY PACKAGING?
Don't Know 14%
No 28%
DO YOU FORESEE MORE GOVERNMENT RESTRICTIONS ON PACKAGING MATERIALS?
Don't Know 1%
No 6%
Source: Teague/Gallup Poll

New Company Reclaims PET, HDPE

The goal is to make new bottles from old ones

Right about now, Clean Tech's HDPE and PET recycling facility in Dundee, Mich., should be up and running.

Working with The Procter & Gamble Co. and Plastipak Packaging, Clean Tech plans to process old bottles into reworkable plastic. From there the plastic will go to Plastipak in nearby Plymouth to be made into new bottles of the types used by P&G in packaging several liquid cleaning products.

Projections call for the Clean Tech plant to process 12 million pounds of plastic during its first year of operation and double that amount in the second year. Three-fourths of the material will be HDPE; the rest, PET.

According to Thomas Busard of Clean Tech, the new company will work in partnership with communities, civic groups, corporations and collection facilities to remove post-consumer bottles from the waste stream. Busard said, "We hope to make a significant impact on how some plastic products are discarded. Many that would have taken up precious space in our landfills will now be recycled."

Detinner To Build Huge Can Facility

World's largest plant will open this summer

AMG Resources Corp., a leader in the steel-can detinning business, has announced plans to construct a huge can-recycling facility in St. Paul, Minn. Having an initial capacity of 40,000 tons a year, the plant is expected to be operational by summertime.

The plant will accept steel cans from the surrounding five-county area as well as from incinerator operators.

After detinning, the steel will be shipped to mills and foundries; the tin will be marketed to chemical and pharmaceuticals industries.

BRIEFS . . .

The Executive Board of the Council for Solid Waste Solutions has approved a $13.2 million, 12-month program promoting the environmentally sound disposal and recycling of plastic products . . . Twinpak PET (Quebec) Inc., a joint venture between Twinpak Inc. of Montreal and 15 Quebec soft-drink bottlers, has announced plans to invest another $8 million in its present **PET-recycling** operation, doubling output . . . Huntsman Chemical Corp.'s **polystyrene** facility recently won Keep America Beautiful's 1989 National Recycling Award for reclaiming 2.5 million pounds of polystyrene scrap . . .

Multipacking: Who Benefits?

Multipacking moves product in warehouse clubs and pops as a promotion—but does that make it a new retail trend?

By Melissa Larson
Senior Editor

Assume you're marketing canned vegetables. Canned goods sales are flat. You're taking a pounding from the fancy frozen-vegetable guys. What do you do?

According to the Can Manufacturers Institute, you offer six cans of product, either of the same or different varieties, in a plastic six-pack carrier. The consumer buys six cans of vegetables, or soup, or pet food, instead of just three or four.

CMI asserts that the multipack concept has boosted canned food sales just as it once did for canned soft drinks, and that many consumers like the concept of buying in bulk at a discount. They say consumer research proves consumers would buy more can multipacks—if they were available.

But does this point to a multipack trend? Would consumers like to buy their facial tissues, shampoo, diapers and snacks in shrink-wrapped groups of four, six-packs of cans and paperboard-wrapped multiples?

Suppliers of the machinery to produce the multipacks perhaps have the most at stake in the answer, but other inquiring minds—like supermarket executives—want to know whether multipacking is a long-term retail trend.

The answer may also have some interesting implications for food and personal-care retailing in the 1990s.

Six-packs of canned vegetables, usually for sale in warehouse clubs, are one of the most popular types of multipacks.

Consumer groundswell?

So far, multipacks of canned food are rarely seen outside of food clubs or warehouse stores. But that will change, says CMI, as traditional supermarket chains feel more competitive heat from warehouse clubs and realize the consumer demand for multipacks.

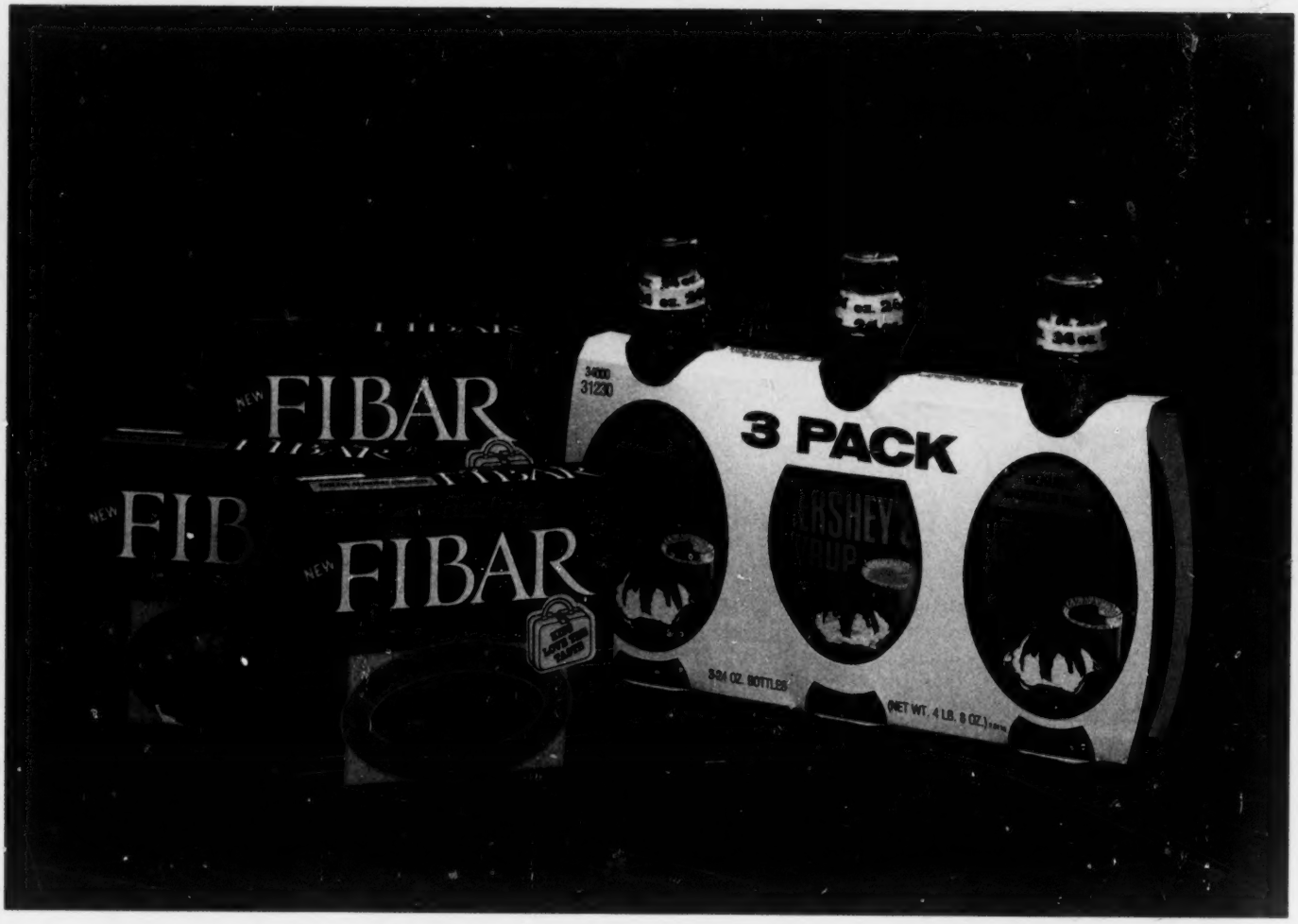
A recently released consumer survey by Elrick & Lavidge, Inc., commissioned by CMI, seems to indicate that shoppers would buy more multipacks of cans if they were available. Canned pet food, canned soup and canned vegetables were the products the study focused on, based on regularity of consumer purchases of these items.

What do consumers like about can multipacks? Carrying and handling ease, price discounts and variety options, according to the study. Concerns they expressed included inability to select the flavors in a variety multipack, and concern that they didn't consume enough product to warrant a multipack purchase.

It's precisely the issues of consumption and choice that are at the heart of chain supermarket executives' reluctance to jump on the multipack bandwagon.

"Who did they poll? Survivalists?" snapped one supermarket spokesperson. "Trying to get the consumer to purchase more product than they want or need is not what we're in business to do. Unless shoppers are interested in stockpiling food, which is a trend I'm not aware of, it's just limiting their choices, not adding to them. There is only so much shelf space."

"It's freedom of choice, both in brands and in quantities, that's attractive to our customers," said another chain executive. "Why would we want to, in effect, tell them how much to buy of a certain item? That's why we



discontinued packaged produce. We see it as a disadvantage to the consumer."

Warehouse buying

There's no question that warehouse clubs are growing, and selling lots of product—most of it multipacked or jumbo-sized. The popularity of items packaged this way in warehouse environments is the most often cited incentive for offering such items in supermarkets.

From their inception in the early 1980s, warehouse clubs have generated steady increases in sales volume. The statistics tell the story: $8 billion in sales in 1986, $11.8 billion in 1987, $13.9 billion in 1988 and an estimated $16.9 billion in sales for 1989, according to *Discount Store News*, which tracks the warehouse club market.

Although a recent shakeout has reduced the number of major players from 25 to about eight, these major chains have the system down to a science. Minimum store size is 100,000 square feet, and margins are razor-thin—about 10 percent, compared to the high teens for most supermarket chains. They depend on fast turnover to, in effect, sell the merchandise before having to pay the vendor companies.

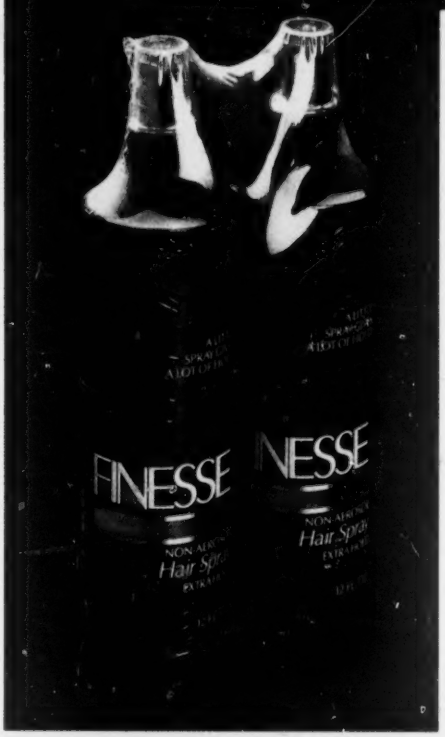
However, if you've ever shopped a warehouse store, you know there's a lot more for sale than food and toiletries. Pet food is stacked next to power tools. Children's toys and clothes are just across the aisle from computers, office copiers and furniture.

There's another key component of the warehouse club system which few realize. The most successful warehouse clubs do at least 50 percent of their business with other companies—restaurants, small offices, etc.—rather than consumers. In effect, they use a retail approach to wholesaling.

"Warehouse clubs are not dependent on consumers, but on other businesses," says Don Longo, executive editor of *Discount Store News*. "In effect, they're competing not with chain supermarkets, but with food wholesalers and restaurant supply houses. Selling multipacks of food to individual consumers is often a very small part of their business. Warehouse clubs and supermarkets really don't compete with each other."

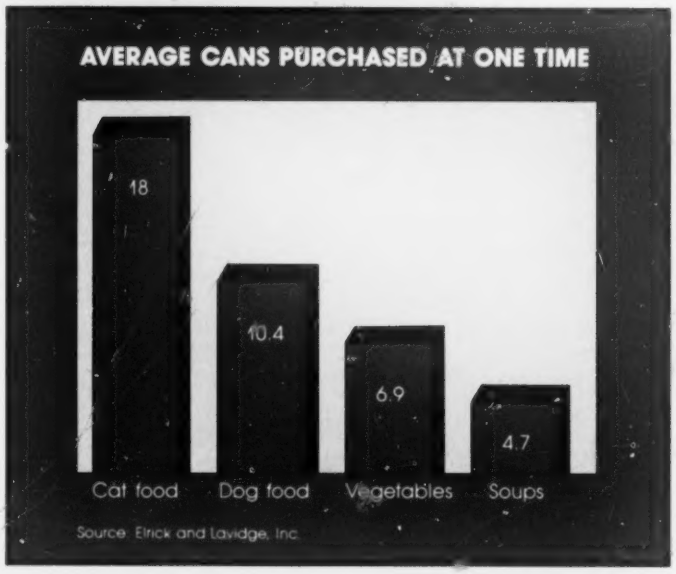
Therefore, it's unlikely that supermarkets are feeling

Warehouse clubs also stock some snack items, such as these multi-variety snack bars, shown here without their original shrink wrap. Other popular food product multipacks include this die-cut paperboard carrier for three 24-ounce bottles of chocolate syrup.



Personal-care items can also be found bundled. These tissues carry a pressure-sensitive label (not shown) identifying them as a "Bundle-Pack."

This shrink-wrapped two-pack of shampoo could be suitable either for warehouse retailing, or as a short-term promotion in a supermarket.



Today's supermarket retailer can force the packager to play his game

very much pressure from the warehouse clubs to offer multipacks.

However, they may be facing pressure from major canners and other food packagers who have invested in the capital equipment for multipacking for warehouse clubs, and now wish to get full use of the machinery by extending their markets for multipacks to their chain customers.

Food canners even have a partner willing to help subsidize the equipment purchases. The Can Manufacturers Institute, made up of the nation's metal can producers, is offering a program it calls "Canpack."

Qualifying food canners earn credits toward the purchase of multipack materials and equipment—by increasing their purchases of metal cans for vegetables, pet food or soup by "specified amounts" during 1990. A similar program was offered to soft-drink canners in 1985, generated $5 million in credits toward multipacking equipment, and is widely credited with helping revive the can market for soft drinks.

Other packagers will probably find themselves footing their own bills for multipacking. This type of packaging is expensive, both in terms of extra material costs and in labor to add the multipack feature. Firms which do not have multipacking equipment usually have their multipacks contract-packed or apply the multipack feature in-house, by hand.

Chain clout

Food and personal-care marketers looking to convince their supermarket customers to stock multipacks may find the timing couldn't be worse. Shelf-space is dwindling and so is supermarket buyers' patience when it comes to disruptive new product introductions.

Moreover, even CMI admits that supermarkets traditionally have been reluctant to stock single cans and multipacks of the same product.

And the supermarket retailer has the clout and the weapons to force the packager to play his game. Today's chain buyer is a hard-nosed bargainer interested in sharing in the profits of any new product introduction, and ill-disposed to take on products not sufficiently test-marketed and consumer-proven.

Slotting allowances, product performance reviews after as little as 90 days, and so-called "failure fees" are the new rules of the game. The balance of power, say virtually all observers of the supermarket distribution system, has shifted permanently from the product supplier to the retailer.

Therefore it will be incumbent upon packagers interested in multipacking to convince not only the consumer, but the retailer, that such offers are practical in the supermarket. Otherwise, they seem destined to remain short-term shrink-banded promotions or warehouse club commodities. ■

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MELISSA LARSON
Senior Editor

"The efforts of the Can Manufacturers Institute have indeed borne fruit for its constituency—and the group has put its money behind the effort as well. However, each packager must make an independent decision on multipacking, based on real economic factors."

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